

## The Current Condition of the Japanese Machine Tool Industry

### Monthly Machine Tool Orders (May 2021)

The total value of machine tool orders in May was 123.94 billion yen. This was a leveling out compared to April 2021. However, this figure represented an increase of 141.9% compared to the same month of the previous year and marked the seventh consecutive month of year-on-year growth.

The total amount of orders exceeded 120 billion yen for the third consecutive month.

Recovery is progressing in all regions, and we would like to expect further revival in the future. On the other hand, we would like to continue to pay close attention to the spread of infection.

Domestic orders fell by 7.9% from April, amounting to 33.22 billion yen. This marked the second month of month-on-month decline. On the other hand, this figure was an increase of 82.6% over the same month of the previous year and marked the year-on-year growth in three consecutive months. Looking at major industries, orders compared to April fell by 4.4% in industrial machinery, by 29.9% in motor vehicles, rose by 21.8% in electrical & precision machinery, and fell by 2.9% in aircraft, shipbuilding & transport equipment.

Foreign orders rose by 3.2% over April to 90.71 billion yen, marked the fourth consecutive month of month-on-month growth. Moreover, foreign orders showed an increase of 174.5% over the same month of the previous year, and this marked the seventh consecutive month of year-on-year growth. By region, orders from Asia fell by 2.3% from April to 50.44 billion yen. This was an increase of 170.2% over the same month of the previous year. Orders from Europe rose by 14.0% over April to 17.06 billion yen. This was an increase of 281.4% over the same month of the previous year. Orders from North America rose by 10.9% over April, amounting to 22.03 billion yen. This figure was an increase of 134.4% over the same month of the previous year.

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## NET NEW ORDERS – METAL CUTTING MACHINE TOOLS IN JAPAN

(Value: in Millions of Yen)

Period		Total 2020	20/19 (%)	20/10-20/12	21/01-21/03	Previous Quarter (%)	year-to-year (%)	21/01-21/05	year-to-year (%)	May ' 21	May 21/Apr. 21 (%)	May 21/May 20 (%)
Industry												
1. Primary Metals		11,265	74.7	2,955	3,905	132.1	97.4	5,954	103.8	954	87.1	139.3
2. Fabricated Metal Products		23,498	73.4	7,181	6,945	96.7	113.8	11,960	142.9	2,778	124.2	278.9
Machinery & Equipment Industries	3. Industrial Machinery	133,112	65.8	34,001	36,952	108.7	93.7	64,150	113.0	13,292	95.6	165.9
	(of which construction machinery)	7,013	60.8	1,307	1,508	115.4	57.4	2,932	100.0	819	135.4	1365.0
	(of which dies and molds )	13,283	63.3	3,089	4,240	137.3	115.8	6,918	119.7	1,220	83.7	156.8
	4. Motor Vehicles	83,437	59.7	26,405	27,354	103.6	106.9	45,837	134.4	7,615	70.1	208.8
	(of which auto parts)	55,580	54.9	18,776	19,639	104.6	128.7	32,562	154.5	5,854	82.8	217.1
	5. Electrical Machinery	21,239	90.2	4,930	7,026	142.5	126.1	11,944	144.2	2,506	103.9	169.3
	6. Precision Machinery	13,076	67.1	2,855	3,648	127.8	100.0	7,252	132.6	2,174	152.0	259.1
	5 – 6. Electrical & Precision Machinery (Sub Total)	34,315	79.8	7,785	10,674	137.1	115.8	19,196	139.6	4,680	121.8	201.8
	7. Aircraft, Shipbuilding & Transport equipment	11,089	45.4	2,232	3,214	144.0	80.7	5,019	99.0	889	97.1	159.0
	(of which aircraft)	3,598	30.0	462	1,140	246.8	49.5	1,565	60.6	329	342.7	204.3
3 – 7. Sub total	261,953	64.0	70,423	78,194	111.0	100.0	134,202	122.4	26,476	89.7	182.1	
8. Other Machinery & Equipment	12,185	77.2	3,699	4,871	131.7	154.8	8,173	158.1	1,674	102.8	149.3	
9. Government, Public Agencies & Schools	2,975	118.5	792	275	34.7	69.4	676	138.8	216	116.8	332.3	
10. Others	8,444	70.1	1,960	2,197	112.1	86.4	3,741	101.4	752	94.9	144.1	
11. Trading Companies	4,135	65.4	766	975	127.3	68.9	1,957	96.5	373	61.2	140.8	
1-11. Domestic Total	324,455	65.8	87,776	97,362	110.9	101.6	166,663	123.3	33,223	92.1	182.6	
12. Foreign	577,380	78.4	182,172	224,734	123.4	161.0	403,343	194.2	90,713	103.2	274.5	
1-12. Grand Total	901,835	73.3	269,948	322,096	119.3	136.8	570,006	166.3	123,936	100.0	241.9	
(of which: NC machines)	884,770	73.3	265,545	317,186	119.4	137.3	561,371	167.1	122,112	100.0	243.9	
Sales	1,033,616	68.8	258,834	306,035	118.2	99.7	502,067	113.7	101,506	107.4	152.0	
(of which: NC machines)	1,010,596	68.5	253,059	300,273	118.7	99.9	492,813	114.2	100,016	108.1	153.1	
Order Backlog	430,794	76.8	430,794	446,582	103.7	91.0	498,460	107.5	498,460	104.7	107.5	
(of which: NC machines)	415,568	76.6	415,568	432,481	104.1	91.3	484,126	108.1	484,126	104.8	108.1	

## NET NEW ORDERS BY DESTINATION

(Value in Millions of yen)

2021		Jan.		Feb.		Mar.		Apr.		May		June		July		Aug.		Sep.		Oct.		Nov.		Dec.		Total 2021			
			%		%		%		%		%		%		%		%		%		%		%		%		%		%
Asia	East Asia	Korea	2,804	140.2	3,692	208.9	2,314	161.6	2,340	152.2	2,190	233.7																13,340	173.9
		Taiwan	2,230	123.8	2,462	198.1	2,923	206.3	3,089	305.5	2,392	145.3																13,096	184.0
		China	25,705	239.3	30,212	409.4	37,384	330.9	37,795	326.9	38,751	273.4																169,847	307.9
		Other	0	-	1	4.3	0	-	368	-	0	-																369	1085.3
		East Asia Total	30,739	211.4	36,367	349.2	42,621	301.0	43,592	309.0	43,333	258.6																196,652	281.0
	Other Asia	Thailand	1,022	103.5	1,116	54.2	1,552	105.2	1,380	147.0	1,858	605.2																6,928	120.2
		Malaysia	764	457.5	517	74.1	542	43.7	831	244.4	740	229.1																3,394	122.6
		Singapore	483	187.9	361	214.9	529	111.4	1,468	308.4	621	149.6																3,462	193.3
		Philippine	23	13.1	60	46.5	259	99.2	120	117.6	74	224.2																536	76.5
		Indonesia	202	24.9	313	60.7	564	153.3	544	290.9	684	670.6																2,307	116.2
Vietnam		614	85.5	253	29.2	370	144.0	654	145.0	930	332.1																2,821	109.7	
India		1,750	94.7	4,810	359.5	4,020	467.4	3,033	393.4	2,190	489.9																15,803	300.3	
Other	4	133.3	25	2500.0	14	466.7	9	3.0	7	700.0																59	19.1		
Other Asia Total	4,862	97.9	7,455	129.1	7,850	158.9	8,039	225.4	7,104	372.3																	35,310	166.9	
Sub Total	35,601	182.5	43,822	270.7	50,471	264.3	51,631	292.1	50,437	270.2																	231,962	254.5	
Europe	EU	Germany	2,514	80.0	3,005	128.0	3,223	238.9	2,933	364.3	3,747	447.7															15,422	181.9	
		Italy	1,770	105.3	2,106	275.7	2,866	550.1	2,991	1137.3	3,266	781.3															12,999	356.4	
		France	874	87.1	1,046	131.6	1,134	266.8	1,294	416.1	1,366	379.4															5,714	197.4	
		Central Europe	865	67.8	635	36.8	1,015	129.0	1,378	181.3	1,337	352.8																5,230	106.2
		Other	2,110	99.9	1,815	78.7	2,305	122.2	2,530	265.5	2,880	220.4																11,640	135.9
		Sub Total	8,133	-	8,607	-	10,543	-	11,126	-	12,596	-																51,005	-
	Other West Europe	U. K.	1,012	65.1	1,123	83.9	1,279	160.7	1,516	207.4	1,664	545.6															6,594	139.5	
		Turkey	1,117	312.9	1,376	204.5	948	224.6	1,103	302.2	1,409	401.4															5,953	274.6	
		Switzerland	266	47.6	486	97.2	643	200.9	483	468.9	485	310.9															2,363	144.3	
		East Europe	24	47.1	106	60.6	113	-	25	3.1	133	211.1															401	37.1	
		Russia - Other	145	26.7	194	109.6	210	36.8	225	101.8	358	246.9															1,132	68.3	
Sub Total	10,776	87.1	12,158	111.4	14,054	195.1	14,964	279.7	17,057	381.4																69,009	171.2		
North America & Oceania	U. S. A.	11,846	73.4	15,057	99.0	18,799	154.1	17,881	165.5	19,168	228.9															82,751	131.9		
	Canada	1,242	111.8	931	72.9	1,513	234.9	1,110	385.4	1,216	440.6															6,012	167.2		
	Mexico	997	109.0	1,946	225.8	1,052	31.5	877	128.4	1,648	219.4															6,520	99.5		
	Sub Total	14,085	77.5	17,934	103.4	21,364	132.0	19,868	168.7	22,032	234.4																95,283	130.8	
South & Central America	Brazil	476	126.3	409	130.7	615	292.9	521	-	383	364.8															2,404	263.0		
	Other	43	72.9	52	152.9	125	595.2	40	-	80	190.5															340	217.9		
	Sub Total	519	119.0	461	132.9	740	320.3	561	-	463	315.0															2,744	256.4		
Oceania	Australia	749	231.2	470	200.9	435	145.0	226	209.3	615	184.1															2,495	191.9		
	Other	35	1750.0	23	230.0	126	-	158	117.0	67	-															409	278.2		
Sub Total	784	240.5	493	202.0	561	187.0	384	158.0	682	204.2																2,904	200.7		
Middle East	245	72.9	259	140.0	155	119.2	380	3800.0	41	136.7																1,080	158.4		
Africa	212	504.8	-4	-	44	75.9	108	284.2	1	-																361	247.3		
Grand Total	62,222	121.5	75,123	166.1	87,389	202.3	87,896	251.2	90,713	274.5																403,343	194.2		
Of which NC	61,740	121.7	74,462	165.2	86,832	203.2	87,321	253.3	90,104	276.6																400,459	194.8		

(Note) It will be described as “-”, if the actual value is “negative” or “0” or no actual value.

Japan Machine Tool Builders' Association

From January 2021, the UK was moved from the “EU” to “other Western Europe”.